



COMPANY / INDUSTRY	PRODUCTS / SERVICES <i>(What)</i>	MARKET ANALYSIS <i>(Who)</i>	MARKETING STRATEGY <i>(How)</i>																																								
<p style="text-align: center;"><b>Company</b></p> <p>Describe the start-up and background of your company</p> <p>Where, when and why started</p> <p>Where you're located and why</p> <p>Your related background, experience, start-up investment and advisory team members</p> <p>Trademarks, patents and logo development</p> <p>Future goals and plans</p> <p style="text-align: center;"><b>Industry</b></p> <p>Describe the state of your industry, who the major players are, chief characteristics (growth and trends), and present a SWOT analysis</p> <p style="text-align: center;"><b>SWOT</b></p> <p>Strengths: list your company's internal strengths in accounting, finance, marketing, human resources, operations, technology</p> <p>Weaknesses: list your company's internal weaknesses in accounting, finance, marketing, human resources, operations, technology</p> <p>Opportunities: List your company's external opportunities in trends, market growth, new markets, new products</p> <p>Threats: List your company's external threats such as new competition, lack of user adoption, lack of sales, price wars</p>	<p style="text-align: center;"><b>Products / Services</b></p> <p>Describe your products, services, unique features, stage of development, production and manufacturing, product liabilities, proprietary features, comparison to competitive offerings</p> <p style="text-align: center;"><b>Value Proposition</b></p> <p>Describe what makes your company, products or services so remarkable and why</p> <p style="text-align: center;"><b>VPMF Test</b> <i>How feasible is your business?</i></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%; text-align: center;">1</td> <td>Value – what value do you bring to the lives of customers?</td> </tr> <tr> <td style="text-align: center;">2</td> <td>Problem-solving - what problem do you solve for your customers?</td> </tr> <tr> <td style="text-align: center;">3</td> <td>Money-making capability – can you make money with this venture?</td> </tr> <tr> <td style="text-align: center;">4</td> <td>Fit – how well does this venture fit your background, experience and financial situation?</td> </tr> </table> <p style="text-align: center;"><b>ELEVATOR PITCH</b></p> <p>Get one ready – you're going to need it. Learn how to give an effective, attention grabbing statement about your business and what makes you and it so special. No time to be shy – your next deal could depend on it.</p>	1	Value – what value do you bring to the lives of customers?	2	Problem-solving - what problem do you solve for your customers?	3	Money-making capability – can you make money with this venture?	4	Fit – how well does this venture fit your background, experience and financial situation?	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"><i>B2B or B2C:</i></td> <td></td> </tr> <tr> <td><i>Market Size:</i></td> <td></td> </tr> <tr> <td><i>Annual Expenditure:</i></td> <td></td> </tr> <tr> <td><i>Total Market Demand:</i></td> <td></td> </tr> </table> <p style="text-align: center;"><b>Market Segments</b></p> <p>Describe your <i>tribe</i> - the different groups who will buy your products or services</p> <p>Which segment(s) will you target and why?</p> <p style="text-align: center;"><b>Target Market Characteristics</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%; text-align: center;">1</td> <td>Demographics – age, income, gender, education</td> </tr> <tr> <td style="text-align: center;">2</td> <td>Psychographics – attitudes, opinions, beliefs</td> </tr> <tr> <td style="text-align: center;">3</td> <td>Geographics - location</td> </tr> <tr> <td style="text-align: center;">4</td> <td>Behavioral – purchase characteristics</td> </tr> <tr> <td style="text-align: center;">5</td> <td>Needs and wants – what problem will you solve?</td> </tr> <tr> <td style="text-align: center;">6</td> <td>Tribe characteristics – what are the higher order values that you can tap into?</td> </tr> </table>	<i>B2B or B2C:</i>		<i>Market Size:</i>		<i>Annual Expenditure:</i>		<i>Total Market Demand:</i>		1	Demographics – age, income, gender, education	2	Psychographics – attitudes, opinions, beliefs	3	Geographics - location	4	Behavioral – purchase characteristics	5	Needs and wants – what problem will you solve?	6	Tribe characteristics – what are the higher order values that you can tap into?	<p style="text-align: center;"><b>Marketing Strategy</b></p> <p>Describe how you will engage, build trust and lead your customer <i>tribe</i>: gain trust, sell later</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"><i>Target Market:</i></td> <td></td> </tr> <tr> <td><i>Product:</i></td> <td></td> </tr> <tr> <td><i>Price:</i></td> <td></td> </tr> <tr> <td><i>Promotion:</i></td> <td></td> </tr> <tr> <td><i>Price:</i></td> <td></td> </tr> <tr> <td><i>Engagement:</i></td> <td></td> </tr> </table> <p style="text-align: center;"><b>Competition</b></p> <p>Who are your major competitors, how do you compare in size and business volume?</p> <p>What is your competitive advantage or distinctive competence? Product, price, promotion, distribution, technology?</p> <p>Anticipated competitive response to your company?</p> <p style="text-align: center;"><b>BRAND PILLARS</b></p> <p>On what basis is your company different from others? What values does your company stand for?</p> <p>List your brand pillars</p> <ul style="list-style-type: none"> <li>• What?</li> <li>• What?</li> <li>• What?</li> </ul>	<i>Target Market:</i>		<i>Product:</i>		<i>Price:</i>		<i>Promotion:</i>		<i>Price:</i>		<i>Engagement:</i>	
1	Value – what value do you bring to the lives of customers?																																										
2	Problem-solving - what problem do you solve for your customers?																																										
3	Money-making capability – can you make money with this venture?																																										
4	Fit – how well does this venture fit your background, experience and financial situation?																																										
<i>B2B or B2C:</i>																																											
<i>Market Size:</i>																																											
<i>Annual Expenditure:</i>																																											
<i>Total Market Demand:</i>																																											
1	Demographics – age, income, gender, education																																										
2	Psychographics – attitudes, opinions, beliefs																																										
3	Geographics - location																																										
4	Behavioral – purchase characteristics																																										
5	Needs and wants – what problem will you solve?																																										
6	Tribe characteristics – what are the higher order values that you can tap into?																																										
<i>Target Market:</i>																																											
<i>Product:</i>																																											
<i>Price:</i>																																											
<i>Promotion:</i>																																											
<i>Price:</i>																																											
<i>Engagement:</i>																																											

<b>OPERATIONS / MANAGEMENT</b> (How)	<b>FINANCIAL PROJECTIONS</b> (When)	<b>STRATEGIC PLANNING</b> (Future)																								
<p>Describe how you will produce your product or service in an efficient way with superior customer satisfaction</p> <table border="1" data-bbox="110 457 602 963"> <tr><td>Manufacturing methods</td></tr> <tr><td>Materials and components</td></tr> <tr><td>Sources of supply</td></tr> <tr><td>Quality management</td></tr> <tr><td>Cost controls</td></tr> <tr><td>Inventory controls</td></tr> <tr><td>Labour considerations</td></tr> <tr><td>Environmental impact</td></tr> <tr><td>Location analysis</td></tr> </table> <p style="text-align: center;"><b>Your Management Team</b></p> <p>List your management team members, roles, responsibilities, personal history, what does each member bring to this venture?</p> <p>Compensation, ownership interest, members of board of directors and backgrounds</p> <p>What is your objective with this venture? Sell out, franchise, license for royalties, buy out investors?</p> <p>How will you attract key people as you grow?</p> <p>Professional team members – list your accountant, lawyer, banker, tax specialist, trade associations, consultants</p> <p>Ownership interest of all parties: who owns what and how much</p> <p>State the business form (sole proprietorship, partnership or corporation) and type of ownership (preferred stock, common stock, debt)</p> <p>Discuss your org structure, management philosophies, personnel, compensation plans, admin procedures and controls, staff training</p>	Manufacturing methods	Materials and components	Sources of supply	Quality management	Cost controls	Inventory controls	Labour considerations	Environmental impact	Location analysis	<p>Supply current and projected financial statements for three years</p> <p>sales forecasts income statements balance sheets cash flow forecasts breakeven analysis</p> <p>List your assumptions and give explanations</p> <p>Give best and worst case scenarios</p> <p>Present your start-up costs and operating costs</p> <p>Calculate your margins</p> <p>Present key financial ratios: debt to equity, acid test, current ratio, ROI</p>	<p>Outline major company objectives and explain how and when they will be achieved</p> <p>Critical milestones and time lines</p> <p>Realistic goals and objectives set</p> <p><b>Key Performance Indicators (KPIs)</b></p> <table border="1" data-bbox="1084 653 1528 1003"> <tr> <td>1</td> <td>What</td> <td>Who</td> </tr> <tr> <td>2</td> <td>What</td> <td>Who</td> </tr> <tr> <td>3</td> <td>What</td> <td>Who</td> </tr> </table>	1	What	Who	2	What	Who	3	What	Who						
Manufacturing methods																										
Materials and components																										
Sources of supply																										
Quality management																										
Cost controls																										
Inventory controls																										
Labour considerations																										
Environmental impact																										
Location analysis																										
1	What	Who																								
2	What	Who																								
3	What	Who																								
	<p style="text-align: center;"><b>Risks</b></p> <p>What are the inherent and potential problems or risks associated with your business? Hit them head on.</p> <table border="1" data-bbox="646 1297 1045 1803"> <tr><td>Product or service</td></tr> <tr><td>Product development</td></tr> <tr><td>Customers, suppliers, distributors</td></tr> <tr><td>Market</td></tr> <tr><td>Entry timing</td></tr> <tr><td>Management, operations, staff</td></tr> <tr><td>Investment capital</td></tr> <tr><td>Legal issues</td></tr> <tr><td>Other resources</td></tr> </table>	Product or service	Product development	Customers, suppliers, distributors	Market	Entry timing	Management, operations, staff	Investment capital	Legal issues	Other resources	<p style="text-align: center;"><b>Quarterly Priorities</b>                      <b>Due</b></p> <table border="1" data-bbox="1084 1192 1528 1780"> <tr> <td>1</td> <td>What</td> <td>When</td> </tr> <tr> <td>2</td> <td>What</td> <td>When</td> </tr> <tr> <td>3</td> <td>What</td> <td>When</td> </tr> <tr> <td>4</td> <td>What</td> <td>When</td> </tr> <tr> <td>5</td> <td>What</td> <td>When</td> </tr> </table>	1	What	When	2	What	When	3	What	When	4	What	When	5	What	When
Product or service																										
Product development																										
Customers, suppliers, distributors																										
Market																										
Entry timing																										
Management, operations, staff																										
Investment capital																										
Legal issues																										
Other resources																										
1	What	When																								
2	What	When																								
3	What	When																								
4	What	When																								
5	What	When																								